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M-200

Operation 2 - Economic Coding

Procedure Manual

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Procedures Manual
Operation 2 – Economic Coding

Au mois de décembre 1996, des mises à jour furent apportées à ce document. Suite aux directives de la Division des opérations du recensement, certaines pages furent remplacées, et d'autres furent modifiées à la main.

In December 1996, this document was updated. Following instructions supplied by the Census Operations Division, some pages were replaced, and others modified by hand.

Prepared by: Census Operations Division
Social, Institutions and
Labour Statistics Field

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I. Introduction

A. Objective

The primary objective of Operation 2 – Economic Coding is to convert the written responses for Questions 37, 38, 39 and 40 into Industry and Occupation codes. The codes assigned are subjected to quality control procedures which ensure they conform to predetermined quality standards. Codes will be obtained from the On-line Reference Manual System (ORMS) which is an electronic version of Industry and Occupation reference material developed for the 1996 Census.

B. Work Flow

Economic Coding consists of four sub-operations: Noting, General Coding, Adjudication and Referral. Each sub-operation is described below. Diagram 1.1 on page 3 illustrates the work flow in Economic Coding.

1. Sub-operation 2A – Noting

Noting constitutes the first phase of Quality Control for Economic Coding. Receipt and Registration will sample the 2B, 2C, 2D and Form 3 questionnaires to be noted. The Noter follows the General Coding procedures to determine and record the appropriate Industry and Occupation codes on the Noting Form. The completed noting forms are then filed to be used during the adjudication phase.

2. Sub-operation 2B – General Coding

In Economic Coding, written responses are converted into numeric codes for Industry and alphanumeric codes for Occupation. An identification of whether or not to code the respondent is performed. At this stage, special codes are assigned to students/trainees, retired workers, volunteers and full-time homemakers. Codes are obtained from a number of reference manuals such as the List of Establishments and Industrial Coding Manual for Industry coding and the Occupational Coding Manual for Occupation coding.

3. Sub-operation 2C – Adjudication

Adjudication is the second phase of Quality Control for Economic Coding. In Adjudication, the codes assigned by the Noter on the noting forms are compared to the codes assigned by the General Coder on all sampled questionnaires within the EA box. If the Adjudicator finds discrepancies between the Noter's and Coder's codes, he records the discrepancies on the Error Listing Form and determines the correct codes by following the General Coding procedures. An error may be charged to either the Noter or Coder, or both. The Adjudicator then counts all the Noter and Coder errors. If the number of Coder errors exceeds a predetermined acceptance-rejection level, the EA is rejected. When rejected under first review, the EA is sent back to General Coding to be re-coded. If an EA is rejected after a

second review, the entire EA is recoded by another Adjudicator. An exception is made for those small EAs in which every questionnaire has been noted (100% EAs). When a 100% sampled EA is rejected in first review, this EA is not sent back to General Coding. Instead, the Coder errors are corrected by the Adjudicator.

4. Sub-operation 2D – Referral

If during General Coding or Adjudication a particular response cannot be coded using standard reference manuals, the question is identified on a Referral Form. Once processing of the EA is completed in Adjudication, the EA is sent to Referral. Referral Coders attempt to determine the appropriate codes through the use of additional reference material such as telephone books, city directories and school lists. A qualified coding consultant is available to resolve cases that cannot be coded by the Referral Coder.

C. Work Flow of Sub-operation 2B – General Coding

Coders in sub-operation 2B – General Coding will code two sets of questions on Form 2B/2C/2D and Form 3 census questionnaires. These are Questions 37 and 38 for Industry and Questions 39 and 40 for Occupation. Part of this sub-operation also involves performing an evaluation of the economic questions to determine whether or not each respondent should be coded (the identification of whom to code step).

To code efficiently, it is essential to:

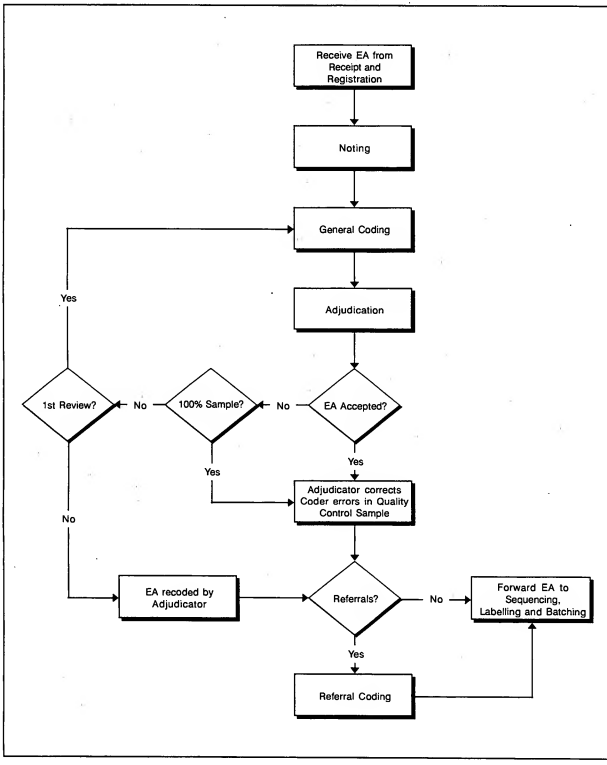
- deal with one questionnaire at a time;
- follow coding procedures for one person at a time;
- carry out the procedures for each person in the following order:
  - Identification of "whom to code"
  - Coding of Industry
  - Coding of Occupation.

Never skip a question without first ensuring that all required actions have been taken.

When coding for one respondent is completed, proceed to the next respondent on the questionnaire. Once all respondents on a questionnaire have been dealt with, proceed to the next Form 2B/2C/2D or Form 3 census questionnaires and repeat the same procedure. Upon completion of all questionnaires in an EA, give the EA box to your coordinator. Your coordinator will perform a spot check of Industry and Occupation coding and send the EA box to the next sub-operation.

If you encounter a problem that is not covered in this manual, consult your coordinator who can advise you on the appropriate course of action.

Diagram 1.1 Economic Coding Work Flow



D. General Coding Instructions

Below is a list of general instructions to be followed when processing an EA in sub-operation 2B.

1. How to Use this Manual

Instructions for coding Industry and Occupation are contained in separate sections of this manual. As well, the first section contains the Identification of Whom to Code instructions which precede the procedures for the Industry and Occupation questions.

Procedures for each chapter are written in sequential format and provide instructions for typical situations. "Special" situations (exceptions) are placed at the end of each chapter. It is imperative when coding a question that all instructions for that question be followed until the appropriate action is determined.

As an aid to the detailed instructions, each chapter contains a summary flow chart of activities to be performed.

2. Control of EA Box

In 1996, the Census Automated Control System (CACS) will be used to electronically control and monitor the movement of EA boxes through Regional Processing operations. The CACS will make use of barcoding technology as a main input to the system. The main functions of the system are:

- scanning EA boxes "IN" to an operation/sub-operation (an EA box will be assumed scanned "OUT" of the previous operation/sub-operation when scanned "IN" to the next);
- scanning of person working on an EA for Economic Coding quality control purposes;
- input of various information pertinent to an EA for management and quality control.

The following actions must be taken by the control clerk in Operation 2B – General Coding to ensure control of each EA box:

(a) Receipt from sub-operation 2A — Noting

- Scan the EA box "IN" from sub-operation 2A.

(b) Receipt from sub-operation 2C — Adjudication (Rejected EAs)

- EAs received from sub-operation 2C – Adjudication (EAs rejected after first review) must be scanned "IN" to sub-operation 2B – General Coding. Ensure that a Reject Label has been affixed to the side of the EA box.

(c) Completion of sub-operation 2B

- Ensure that all Form 2B/2C/2D and Form 3 (UR) questionnaires are placed back in the EA box in numerical order.
- Ensure that any referral forms for this EA are placed on top of the questionnaires.
- Return the EA box to your coordinator.

3. On-line Reference Manual System (ORMS)

The On-line Reference Manual System will be used in Economic Coding for the 1996 Census. This system replaces the paper copies of the List of Establishments, Industrial Coding Manual and Occupational Coding Manual. All information contained within these manuals has been transformed into an electronic format which will allow more efficient coding of Industry and Occupation responses.

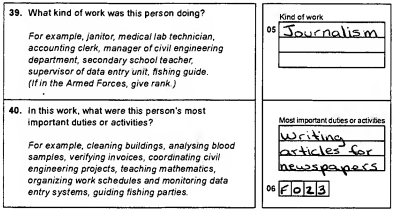
4. Coding Guidelines

There are some basic instructions to be followed when coding each questionnaire.

(a) Sometimes respondents attach notes to their questionnaires containing information useful for coding in Operation 2. These notes will be placed in a comments envelope which will be kept in the EA box. The Coder must check the EA box for the respondent comments envelope and read all information before coding the economic questions. This information should be taken into account and the Coder must replace the note in the respondent comments envelope once processing of the questionnaire is complete.

(b) When writing codes on the questionnaire, always use a sharp black lead pencil. Write each character legibly in a separate box, filling all boxes (see Diagram 1.2 on page 6.

Diagram 1.2
Entering Codes



5. Completion of the Referral Form

As stated previously, it may not be possible for you to code a question with the reference material available to you. Sub-operation 2D – Referral has been established to deal with Industry and Occupation responses which require additional reference material. Be sure to use a new Referral Form for each EA or when the previous Referral Form is completed.

When you encounter a question which must be referred, enter the following information on the Referral Form:

(1) PROV/FED/EA/VN of the EA being processed;
(2) your coder number and the date;
(3) document type and household number of the questionnaire being referred;
(4) questionnaire number (e.g., "1 of 1", "1 of 3");
(5) person number for the person whose question is being referred;
(6) question number being referred (i.e., use a ✓).

Continue using this form for any other referrals in the EA. When all referrals have been identified for an EA, record the page number in the upper right corner of each Referral Form that was used for the EA (e.g., 1 of 2, 2 of 2). **Always use a new Referral Form** (or set of Referral Forms) for each EA being processed.

Diagram 1.3 on page 8 is an example of a Referral Form which will be completed by a Coder in Sub-operation 2B.

A Referral Form should only be used once every effort has been made to code the question. However, if a question cannot be coded with the materials available, or the procedures require the question to be referred, ensure all required information is entered on the Referral Form.

In some instances a question might be referred when it could have been coded in sub-operation 2B. This is known as an over-referral. The referral clerk in sub-operation 2D will notify his coordinator of all cases of over-referral. The 2B coordinator will attempt to eliminate further cases of over-referral by spot checking the clerk's work and/or retraining the clerk.

6. Referral Label (R-206)

Every EA in which at least one question has been referred should have a Referral Label (R-206) affixed to the box. This will be done by either a Coder in sub-operation 2B or by an Adjudicator in sub-operation 2C.

7. Recoding of Rejected EAs

It may be determined in sub-operation 2C – Adjudication that the coding performed on certain EAs fails to meet pre-established quality standards. These EAs are known as rejected EAs and must be reprocessed through sub-operation 2B – General Coding. If your coordinator gives you an EA to be recoded, take the following action:

(a) Look at Questions 37 to 40 for each person on every Form 2B/2C/2D and/or Form 3 questionnaire in the EA box.

(b) Perform all coding steps as though the EA had never been through sub-operation 2B – General Coding.

(c) If the new code differs from the original code on the questionnaire, **erase completely** the original code and enter your new code.

(d) If you can code a question that had originally been referred, enter your code on the questionnaire and delete the corresponding entry from the Referral Form. If the question coded was the only referral in the EA box, destroy the Referral Form and detach the Referral Label from the EA box.

Diagram 1.3
Economic Coding Referral Form

1996 Census of Canada
Regional Processing
Sub-operation – Referral

Economic Coding – Referral Form

Recensement du Canada de 1996
Découpllement régional
Sous-opération – Renvoi

Codage des variables économiques – Formule de renvoi

Form Formule **R-217**

Page ___ of / de ___

PROV	FED CÉF	EA SD	VN NV

Coder No. N° du codeur	Date
Referral Clerk No. N° du commis au renvoi	Date

Document type Type de document	Household No. N° de ménage	Questionnaire No. N° du questionnaire	Person No. N° de personne	Question 38 Industry Industrie	Question 40 Occupation Profession	Referral code Code de renvoi	Consultant	Over-referral Renvoi inutile
	Total number of codes referred for this page Nombre total de renvois pour cette page							
	Cumulative total number of codes referred Nombre total cumulatif de renvois							

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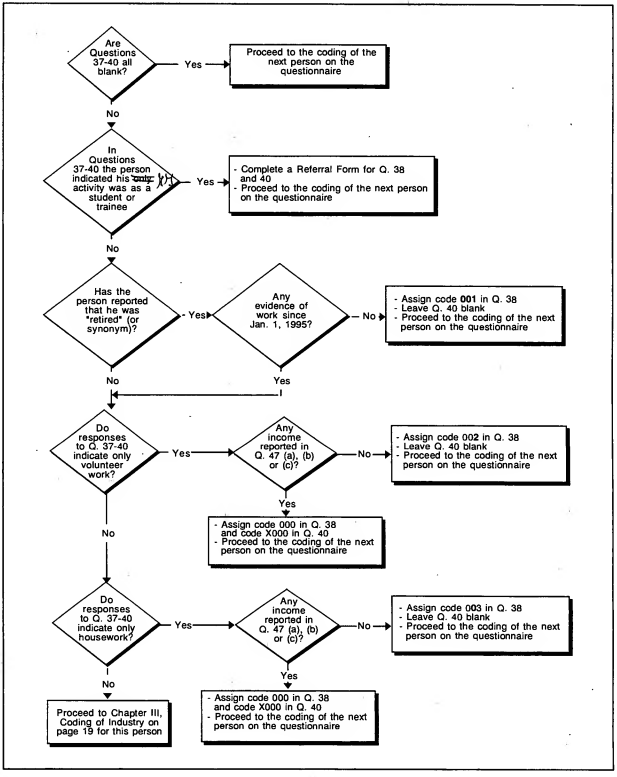
Canada

Identification of Whom to Code Flow Chart



II. Identification of Whom to Code

A. Introduction

Economic coding will be performed for respondents 15 years of age and over, who have reported an industry and/or an occupation in Questions 37 to 40, and have worked at any time between January 1, 1995 and May 14, 1996. This includes recent immigrants who have worked in another country. In most instances, whether or not to code respondents will be obvious by the Industry and Occupation responses reported in Questions 37 to 40. There are some cases, however, which require special attention.

- **Non-response to Both Industry and Occupation**
- **Students/Trainees**
- **Retired Workers**
- **Volunteer Workers**
- **Full-time Homemakers**

The flow chart on page 10 summarizes the activities to be performed in Chapter II – Identification of Whom to Code.

B. Specific Procedures

For each respondent, begin with Part 1 – Non-response to Both Industry and Occupation on this page and continue through each section **OR** until the appropriate action to be taken becomes apparent.

1. Non-response to Both Industry and Occupation

As a first step, check to see if Questions 37 to 40 are all blank for the respondent. If Questions 37 to 40 are all blank, then simply proceed to the coding of the NEXT person on the questionnaire.

2. Identification of Students/Trainees

This step is necessary to identify respondents who reported their school or trainee activities as work in Questions 37 to 40. Refer to Table 2.1 on page 12.

Table 2.1 Identification of Students/Trainees

Situation	Examples	Action
In Questions 37 to 40, the respondent has indicated that his ~~only~~ activity was as a student, or trainee.	Student Trainee Training program Adult training program Job re-entry program Government training program	Complete a Referral Form for Questions 38 (Industry) and 40 (Occupation). Proceed to the coding of the NEXT person on the questionnaire.
If none of the above conditions apply		Proceed to Part 3 – Identification of Retired Workers below.

3. Identification of Retired Workers

Some respondents correctly report their industry and occupation for a job held after retirement. Other respondents incorrectly report industry and occupation information for a job held prior to retirement.

When a respondent has specifically stated that he is "retired", or has responded using a synonym, it is necessary to determine whether the respondent has worked at any time between January 1, 1995 and May 14, 1996. **If there is no indication that the respondent is retired, proceed to Part 4 – Identification of Volunteer Workers on page 13.**

If the respondent has indicated that he is **"RETIRED"**, refer to Table 2.2 on page 13.

Table 2.2 Evidence of Work

Situation		Action
Respondent indicates he is **"RETIRED"**, and **ANY ONE** of the following responses is given:		Consider that this person is **not retired** and continue with Part 4 – Identification of Volunteer Workers below.
Question	Response	
31	An "HOURS" entry of 01 to 168	
OR		
36	"In 1995" OR "In 1996"	
OR		
45	A "WEEKS" entry of 01 to 52	
OR		
47 (a), (b), (c)	Dollar amount entry, or "YES" circle checked	
Respondent indicates he is "RETIRED" but there is no evidence of work as described above.		Assign CODE **001** in Question 38. Leave Question 40 blank. Proceed to the coding of the NEXT person on the questionnaire.

Note: The above procedures do not cover respondents who appear to be retired, but have not specifically indicated that they were "retired" (or a synonym). In 1996, there will be a special head office automated edit which will detect and correct the labour responses for these persons. All these respondents must, however, have their industry and occupation responses coded.

4. Identification of Volunteer Workers

For census purposes, volunteer work should not be reported in Questions 37 to 40. Table 2.3 on page 14 describes the actions to follow when volunteer work is reported by the respondent.

Table 2.3 Identification of Volunteer Workers

Situation	Example	Action
If responses to Questions 37 to 40 **clearly indicate only volunteer work AND some income** is reported in Question 47(a), (b) or (c), ("Yes" circle is checked, and/or a dollar amount entry is present)	Q. 37 – "Canadian Cancer Society" and Q. 38 – "Volunteer Fundraising" and Q. 39 – "Volunteer canvasser and Q. 40 – "Going door-to-door" Q. 47 (a) "Yes" circle checked, $12,000 (b) "No" circle checked, dollar amount blank (c) "No" circle checked, dollar amount blank	Assign **CODE 000** in Question 38 and **CODE X000** in Question 40. Proceed to the coding of the NEXT person on the questionnaire. **Note:** Income reported in Question 47(a), (b), or (c) is evidence of another job held since January 1, 1995. Information for this job should have been reported by the respondent in Questions 37 - 40, rather than the volunteer work. Codes 000 and X000 are the Industry and Occupation "not stated" codes.
If responses to Questions 37 to 40 **clearly indicate only volunteer work AND no income** is reported in Question 47 (a), (b), or (c), ("Yes" circle is not checked and the dollar amount field is blank)	Q. 37 – "Canadian Cancer Society" and Q. 38 – "Volunteer Fundraising" and Q. 39 – "Volunteer canvasser and Q. 40 – "Going door-to-door" Q. 47 (a) Both "Yes" and "No" circle blank, dollar amount blank (b) "No" circle checked, dollar amount blank (c) "No" circle checked, dollar amount blank	Assign **CODE 002** in Question 38. Leave Question 40 blank. Proceed to the coding of the NEXT person on the questionnaire.
If none of the above conditions apply		Proceed to Part 5 – Identification of Full-time Homemakers on page 15.

5. Identification of Full-time Homemakers

Some respondents may **only** report housework, maintenance, or repair work to their own home in Questions 37 to 40. Like volunteer work, these activities should **not** be reported in Questions 37 to 40. Table 2.4 below describes the actions to be taken to identify full-time homemakers.

Table 2.4 Identification of Full-time Homemakers

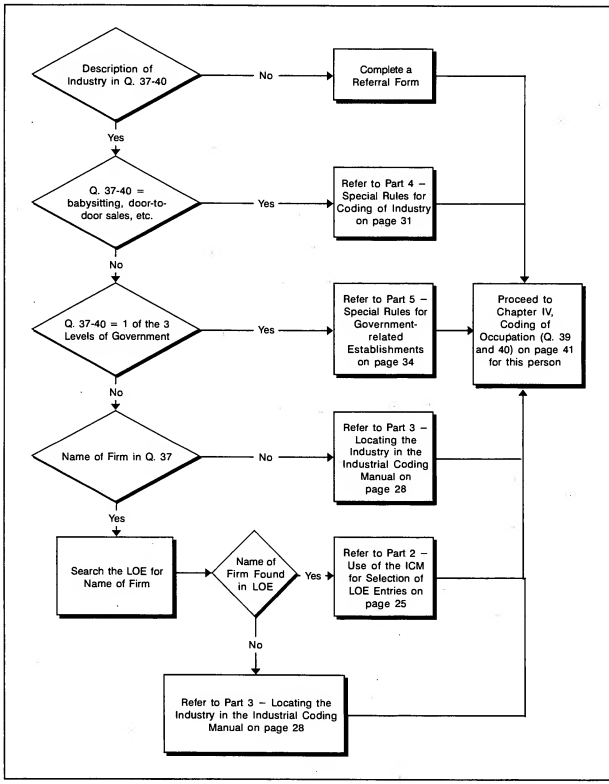
Situation	Example	Action
If responses to Questions 37 to 40 **clearly indicate only housework AND some income** is reported in Question 47 (a), (b), or (c), ("Yes" circle is checked and/or a dollar amount entry is present)	Q. 37 – "My family" and Q. 38 – "Housekeeping for my family" and Q. 39 – "Housewife" and Q. 40 – "Cooking, cleaning, etc." Q. 47 (a) "Yes" circle checked, $10,000 (b) "No" circle checked, dollar amount blank (c) "No" circle checked, dollar amount blank	Assign **CODE 000** in Question 38 and **CODE X000** in Question 40. Proceed to the coding of the NEXT person on the questionnaire. Note: Income reported in Question 47(a), (b), or (c) is evidence of another job held since January 1, 1995. Information for this job should have been reported by the respondent in Questions 37 - 40, rather than housework. Codes 000 and X000 are the Industry and Occupation "not stated" codes.
If responses to Questions 37 to 40 **clearly indicate only housework AND no income** is reported in Question 47(a), (b) or (c), ("Yes" circle is not checked, and the dollar amount field is blank)	Q. 37 – "My family" and Q. 38 – (blank) and Q. 39 – "Homemaker" and Q. 40 – "Cooking, cleaning, taking care of children, etc." and Q. 47 (a) "No" circle checked, dollar amount blank (b) "No" circle checked, dollar amount blank (c) "No" circle checked, dollar amount blank	Assign **CODE 003** in Question 38. Leave Question 40 blank. Proceed to the coding of the NEXT person on the questionnaire.
If none of the above conditions apply		Proceed to Part 6 – Response to Questions 37 to 40 on page 16.

Note: A response of "for myself" or "for my spouse" is **not** sufficient to indicate housework.

6. Response to Questions 37 to 40

If there are responses to any of Questions 37, 38, 39 or 40 **and** none of the above special situations apply, **Proceed to Chapter III, Coding of Industry** on page 19.

Coding of Industry Flow Chart



III. Coding of Industry

A. Introduction

Everyone who worked since January 1, 1995 should have completed Question 37, **For whom did this person work?** and Question 38, **What kind of business, industry or service was this?** The responses to these two questions usually take the form of a company name or name of firm (Question 37) and a business description (Question 38). Together they provide the information required to identify the industry in which the respondent worked.

To convert the written responses in Questions 37 and 38 into 3-digit industry codes, two reference sources are provided: the List of Establishments (LOE), which lists the names and addresses of some of the more common businesses (i.e. companies, firms, institutions, etc.) in Canada, and the Industrial Coding Manual (ICM) which classifies all industries into divisions, major groups and classes. Both reference sources use the same industry codes based on the Standard Industrial Classification (SIC).

The layout of this chapter is identification of exception cases followed by general coding procedures and then specific coding procedures.

B. Identification of Exception Cases

There are a limited number of exception coding situations requiring special instructions and processing. These situations are listed before the general coding procedures, because they do not follow the normal flow of industry coding. Whenever these cases occur during the coding process, turn to the indicated "special rules" section for details on how to code industry responses.

For the following exception cases turn to Part 4 – Special Rules for Coding of Industry on page 31.

- Babysitting
- A respondent employed in a co-operative
- A salesperson engaged in the direct distribution of products, or selling door-to-door, including newspaper delivery boys/girls
- An industry code 720 – "Investment Intermediary Industries" found in the LOE
- A respondent reporting that he works for a private household, for example, a cleaner working for one individual household (Mrs. Smith).

For the following exception case turn to Part 5 – Special Rules for Government-related Establishments on page 34.

- A respondent employed in one of the three levels of government (federal, provincial or local).

Note: Indian bands or reserves are considered local government.

C. General Procedures

There are five possible situations based on whether there are multiple, single or no responses to Questions 37 and 38.

(a) One name of firm is provided in Question 37

Continue with Part 1 – Locating the Name of the Firm in the List of Establishments (LOE) on page 23.

(b) Two or more names of firms are provided in Question 37

Situation	Action
If one of the firms is a personnel-supplying agency (e.g., Office Overload)	Select this firm name.
If there is an indication that the respondent is **currently** working for only one of the firms	Select this firm name.
If the responses to Questions 38, 39 and 40 relate to only one of the firm names	Select this firm name.
If there is an indication that one of the firms is more important than the other(s) (i.e. the respondent works more hours at one of the firms)	Select this firm name.
If none of these conditions are found	Select the first firm name.

When the firm name has been selected, continue with Part 1 – Locating the Name of the Firm in the List of Establishments (LOE) on page 23.

(c) **No name of firm** is provided in Question 37, **but a single description** of industry is given in Question 37 or 38.

Turn to Part 3 – Locating the Industry in the Industrial Coding Manual (ICM) on page 28.

(d) **No name of firm** is provided in Question 37, **but two or more descriptions** of industry are given in Question 37 or 38.

Situation	Action
If one of the descriptions of industry is for a personnel-supplying agency (i.e. Office Overload)	Select this description.
If there is an indication that the respondent is **currently** working in only one industry	Select this description.
If the information on occupation in Questions 39 and 40 relate to only one of the descriptions	Select this description. **Note:** It is generally preferable when deciding which responses to code that the Industry and Occupation responses be consistent.
If there is an indication that one of the industry descriptions is more important than the other(s) (i.e. the respondent works more hours at one of the jobs)	Select this description.
None of these conditions are found	Select the first description given.

When the industry description has been selected, continue with Part 3 – Locating the Industry in the Industrial Coding Manual (ICM) on page 28.

(e) For cases where there is **no industry information** given in either Question 37 or 38.

Situation	Action
No response to Questions 37 and 38 and there is **also** no response to Questions 39 and 40	Proceed to the coding of the next person on the questionnaire.
No response to Questions 37 and 38, but there is a response to Questions 39 and 40 which provides a **name of firm**	Continue with Part 1 – Locating the Name of the Firm in the List of Establishments (LOE) on page 23.
No response to Questions 37 and 38, but there is a response to Questions 39 and 40 which provides a **description of industry**	Turn to Part 3 – Locating the Industry in the Industrial Coding Manual (ICM) on page 28.
No response to Questions 37 and 38 and the responses in Question 39 and 40 do not provide a name of firm or industry description	Complete a Referral Form for this question.

D. Specific Procedures

The specific procedures are broken down into five sections as follows:

1. **Locating the Name of the Firm in the List of Establishments (LOE)** on page 23

   This step should be followed whenever a "firm name" is given.

2. **Use of the Industrial Coding Manual (ICM) for Selection of LOE Entries** on page 25

   For any LOE entry that is found, the description of industry given by the respondent **must be checked** for consistency with the industry code in the LOE.

3. **Locating the Industry in the Industrial Coding Manual (ICM)** on page 28

   This step is followed in cases where there is no name of firm on the questionnaire or the name of firm cannot be found in the LOE. Industry descriptions are searched for in the Industrial Coding Manual only.

4. **Special Rules for Coding of Industry** on page 31

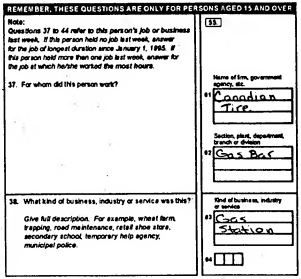
5. **Special Rules for Government-related Establishments** on page 34

1. Locating the Name of the Firm in the List of Establishments (LOE)

Search through the LOE for the name of firm as reported in Question 37. Two possibilities exist based on whether or not the firm name is found in the LOE:

Situation	Action
Name of firm is found in the LOE one or more times (refer to Diagram 3.1 on page 24.)	Turn to Part 2 – Use of the Industrial Coding Manual (ICM) for Selection of LOE Entries on page 25.
Name of firm is not found in the LOE	Search again using alternate methods such as: • abbreviating the firm name or converting the firm name to its full length; • trying to correct the spelling.
Name of firm is still not found in the LOE	Turn to Part 3 – Locating the Industry in the Industrial Coding Manual (ICM) on page 28.

Diagram 3.1
Industry Questions 37 and 38



LOE/LDE - ON

CANADIAN TIRE CORPORATION LIMITED Lines 1___ to

CANADIAN TIRE CORPORATION LIMITED

10 LOCATIONS/ENDROI

552 LINK / LIEN 781 TAPSCOTT RD, SCARBOROUGH
552 LINK / LIEN 30 BANCROFT ST, HAMILTON
552 LINK / LIEN 31 DEAN AVE, SUDBURY
552 LINK / LIEN 1435 CYRVILLE ROAD, OTTAWA
552 LINK / LIEN 1355 MEYERSIDE DR, MISSISSAUGA
552 LINK / LIEN BLUE HERON DR (EAST SIDE), LONDON
552 LINK / LIEN 775 TAPSCOTT ROAD, SCARBOROUGH
456 LINK / LIEN 2111 STEELES AVE E, BRAMPTON
479 LINK / LIEN 8550 GOREWAY DRIVE, BRAMPTON
456 LINK / LIEN 1001 SHEPPARD AVE E, TORONTO

F1=Help F3=Manuals List F4=Search Screen F7=Prev Page F8=Next Page
F10=Prev Ref F11=Next Ref F12=Prev Screen

2. Use of the Industrial Coding Manual (ICM) for Selection of LOE Entries

(a) Take the code found next to the LOE entry. For multi-establishment firms (i.e. companies listed more than once) start with any LOE entries that have an address in the LOE matching the response shown in Question 43 on the questionnaire.

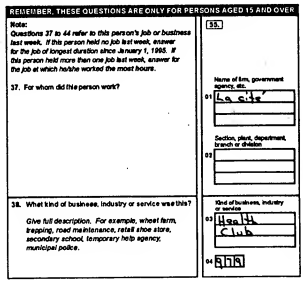
(b) Look at the Analytical Index portion of the ICM for this code.

(c) Compare the description in the ICM with the description in Question 38, including any entries on the "Section, plant, department, branch, division" line in Question 37. For multi-establishment firms, see note below. If the description is not for a multi-establishment firm, continue with the Situation/Action table on page 26.

Note: When coding multi-establishment firms, if a section/plant/department/branch/division entry given by the respondent in Question 37 is **relevant to one of the codes**, this information takes precedence over the description of industry, since in Question 38 respondents sometimes describe the activity of the entire company, rather than the activity of the establishment (or branch) in which they actually work.

Situation	Action
The description in Question 38 **matches in meaning** with the industry description in the ICM, i.e. appears to be the same type of economic activity (refer to Diagram 3.2 on page 27).	Accept and write the industry code in the coding boxes in Question 38. Proceed to Chapter IV, Coding of Occupation on page 41 for this person.
The description in Question 38 **does not match in meaning** with the industry description in the ICM **AND** there is only one LOE entry.	Complete a Referral Form for this question. Proceed to Chapter IV, Coding of Occupation on page 41 for this person.
The description in Question 38 **does not fit logically** into the industry description in the ICM **AND** there is more than one LOE entry.	Select the next industry code from the LOE and compare the new industry code. **IF one** of the industry codes matches the description in Question 38: accept and write industry code in the coding boxes in Question 38; proceed to Chapter IV, Coding of Occupation on page 41 for this person. **IF none of the industry codes matches the description in Question 38:** complete a Referral Form for this question; proceed to Chapter IV, Coding of Occupation on page 41 for this person.
A description of industry **has not been given** in Questions 37-40.	Complete a Referral Form for this question. Proceed to Chapter IV, Coding of Occupation on page 41 for this person.

Diagram 3.2
Using the Analytical Index


REMEMBER, THESE QUESTIONS ARE ONLY FOR PERSONS AGED 15 AND OVER

Note:
Questions 37 to 44 refer to this person's job or business last week. If this person held no job last week, answer for the job of longest duration since January 1, 1995. If this person held more than one job last week, answer for the job at which he/she worked the most hours.

37. For whom did this person work?

35.

Name of firm, government agency, etc.
01 La cite

Section, plant, department, branch or division
02

38. What kind of business, industry or service was this?

Give full description. For example, wheat farm, trapping, road maintenance, retail shoe store, secondary school, temporary help agency, municipal police.

Kind of business, industry or service
03 Health Club
04 SPA

ICM - Definitions

79 Lines 1___ to 17

---

79 - Other Personal and Household Services

Establishments primarily engaged in providing shoe repair service, fur cleaning, repair and storage and other personal or household services not elsewhere classified.

Establishments primarily engaged in hat cleaning are classified in **972** - Laundries and Cleaners.

Where fur cleaning, repair and storage are carried on as secondary activities in a retail fur store, the establishment will be classified in **614** - Clothing Stores n.e.c..

Establishments primarily engaged in operating cold storage warehouses are classified in **479** - Other Storage and Warehousing Industries.

Hair removing, electrolysis
Health clubs, physical fitness
Health spas, physical fitness

=Help F3=Manuals List F4=Search Screen F7=Prev Page F8=Next Page
0=Prev Ref F11=Next Ref F12=Prev Screen

3. Locating the Industry in the Industrial Coding Manual (ICM)

The description of industry given in Question 38 should be converted to an industry title. Search for this title in the Alphabetical Index of the ICM.

> **Note:** If the respondent has provided only one description of industry, but it is vague (i.e. an industry title cannot be determined or two or more industry titles might apply), complete a Referral Form for this question.

If the industry is a **government-operated establishment** or a custodial institution (e.g., penitentiary, jail, reform school):

- Turn to Special Rules for Government-related Establishments on page 34.

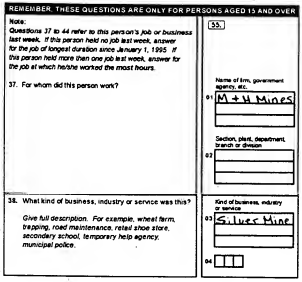
If the industry is **not** a government-operated establishment or a custodial institution:

- Search in the ICM for a matching entry to the one given by the respondent (refer to Diagram 3.3 on page 30) and follow the instruction in the Situation/Action table on page 29.

Situation	Action
1. If the industry title is found in the Alphabetical Index of the ICM, look up the industry code in the Analytical Index Ensure that the correct code has been selected by checking that: (a) the code description agrees with the industry title; (b) the industry title is not listed as an exclusion; (c) the title is compatible with other titles in the list.	**If the industry code in the Analytical Index is appropriate:** accept and write the industry code in the coding boxes of Question 38; proceed to Chapter IV, Coding of Occupation on page 41 for this person. **If the industry code in the Analytical Index is not appropriate:** try to identify a different industry title by following the Actions in point (2) below.
2. If the industry title is not found in the Alphabetical Index of the ICM	Search the Alphabetical Index again, after applying one or more of the following instructions: (a) rearrange the order of the words in the industry title; (b) ensure that the spelling is correct; (c) search for synonyms for the industry title. If the industry title is **now found** in the Alphabetical Index, repeat point (1) above.
3. If after all search attempts the industry title still is not found in the Alphabetical Index of the ICM	Complete a Referral Form for this question. Proceed to Chapter IV, Coding of Occupation on page 41 for this person.

Note: When an industry title cannot be found in the Alphabetical Index, another method that may be used to search for an industry code is to browse the classification structure of the ICM to identify industry classes which may contain industry titles similar to the one being searched.

Diagram 3.3
Using the ICM



SCEICMI ICM - Alphabetic Index

Lines 831_ to 8

061	**Silver mine**
061	Silver ore milling
061	Silver ore mining
392	Silver plate, manufacturing
295	Silver smelting and refining, primary
061	Silver-cobalt mine
061	Silver-cobalt ore mining
061	Silver-lead mine
061	Silver-lead-zinc mine
061	Silver-lead-zinc ore mining
392	Silversmith
656	Silverware and plated ware, retail
392	Silverware for religious use, manufacturing
392	Silverware plating
656	Silverware-cleaning, repairing and replating
596	Silverware, wholesale
183	Simplex machine (double-faced) fabric warp knitting

F1=Help F3=Manuals List F4=Search Screen F7=Prev Page F8=Next Page
F10=Prev Ref F11=Next Ref F12=Prev Screen

4. Special Rules for Coding of Industry

Situation	Action
Babysitting	(1) Babysitters who babysit **in another person's home** are coded to 979, "Other Personal and Household Services, n.e.c." (e.g. This code would include teenagers doing babysitting for neighbours). (2) Babysitters who take children **into their own home** are coded to 864, "Non-institutional Social Services". Exceptions: **Live-in** babysitters/nannies who perform child care **in another person's home** are coded to 974, "Private Households." Babysitters who are **employed by an agency (whether or not they work in their own home)** are coded to 979, "Other Personal and Household Services, n.e.c.".
"Co-operative" or "Co-op" is found in the name of firm	Co-operatives are sometimes engaged in a variety of activities, but may have only one or two establishments. The industry code given in the LOE should be used for these firms, even if it seems inappropriate. If a person indicates a co-operative not included in the LOE, complete a Referral Form.
Persons engaged in the direct distribution of products/ selling door-to-door (including newspaper boys/girls)	Such persons are self-employed or are paid on a commission basis and should be coded to 692 – Direct Sellers. The following is a list of some of the companies which sell their products through direct distribution: – Alsi Compagnie Ltée (cosmetics) – American Music Corporation Ltd. (stereo equipment) – Amway of Canada Ltd. (cleaning products) – Avon Products Ltd. (cosmetics) – Beauty Counsellor (cosmetics)

Special Rules for Coding of Industry (Continued)

Situation	Action
Persons engaged in the direct distribution of products/ selling door-to-door (including newspaper boys/girls) (Concl.)	– Chamber Food Club (food plan) – P. F. Collier and Son Ltd. (encyclopedias) – Dumont Aluminium Ltd. (doors, etc.) – Electrolux Canada Ltd. (vacuum cleaners) – Encyclopedia Britannica (books) – Familex Products Ltd. (patented medicine) – Fine Arts Sterling Silver (Flatware) – Fuller Brush Company Ltd. (cleaning products) – Lucky One Beverages (soft drinks) – Mary Kay Cosmetics (cosmetics) – Ott Domestic Provisions (food plan) – W. T. Raleigh Company Ltd. (patented medicine) – Reader's Digest Canada Ltd. (books) – Sarah Coventry of Canada (jewellery) – Seal'n Save Sales Ltd. (plastic housewares) – Spenser Supports (Canada) Ltd. (corsets) – Stanley Home Products (household products) – Tupperware Home Products (plastic houseware) – Watkins Products Incorporated (food products) – Worldbook, Childcraft of Canada (educational books) If the name of firm in Question 37 is <u>not</u> contained in the list above, follow the normal coding procedures beginning with part 1 - Locating the Name of the Firm in the List of Establishments (LOE) on page 23.
Industry code in the LOE is 720 – Investment Intermediary Industries	A respondent may report that he works for a company with industry code 720 when, in fact, he works for a subsidiary. The situation is made more complex if the company has an entirely different name than the subsidiary. Therefore, if the industry code in the LOE is 720, study the occupation reported in Questions 39 and 40.

Special Rules for Coding of Industry (Concluded)

Situation	Action
Industry code in the LOE is 720 – Investment Intermediary Industries (Concl.)	1. **If the occupation is financial, clerical or administrative in nature:** accept and code the 720 industry code in the space provided in the lower left corner of Question 38 on the questionnaire; proceed to Chapter IV, Coding of Occupation on page 41, for this person. 2. **If the occupation is not financial, clerical or administrative in nature:** study the description of industry in Question 38, along with the occupation reported, to determine the actual industry in which the respondent works. If the industry can be determined, return to part 3 - Locating the Industry in the Industrial Coding Manual (ICM) on page 28. If the industry cannot be determined, complete a Referral Form for this question; proceed to Chapter IV, Coding of Occupation on page 41, for this person.
Private households	A respondent who works for a private household should be given industry code 974 – Private Households, regardless of the industry description provided. This would apply to respondents who report that they work in another person's home doing any manner of work for private individuals (e.g., cleaning house for Mrs. Jones, raking leaves for Mr. Smith).

5. Special Rules for Government-related Establishments

(a) Custodial institutions (e.g., penitentiaries, jails, reform schools)

These institutions should be coded to one of the industries in Division N, Government Service Industries of the Industrial Coding Manual. The specific code assigned depends on the sponsoring government for the institution (i.e. federal, provincial or local).

(b) Indian Bands/Reserves

Indian Band or reserve activities should be coded to local/municipal administration when the activities are administrative or "governmental" in nature. In those cases where Band activities are similar to privately-owned establishments (e.g., schools), they should be coded in the same manner as other government establishments of this type as discussed below.

(c) Government-operated Establishments

Although some industries are obviously government-run, or have a strong government relationship, it is not always correct to assign them to the administrative government codes found in Division N, Government Service Industries of the ICM. Often these government-related establishments are grouped with private industries that perform similar functions and the ICM code to be assigned is not in Government Services. Please study the responses to Questions 37, 38, 39 and 40 and compare them with the industries identified in the following tables. In general, these responses should be coded in Divisions other than Government Service Industries.

Government-operated Establishments

Situation	Condition	Action
If responses in Questions 37-40 correspond to one of the listed categories on pages 36 to 38.	Search the Analytical Index for the code listed in the column "Possible code assignment". Ensure that the correct code has been selected by checking that: (a) the code description agrees with the industry title; (b) the industry title is not listed as an exclusion; (c) the title is compatible with other titles.	If the industry title is found and is compatible: accept the industry code; proceed to Chapter IV, Coding of Occupation on page 41 for this person. If the industry title is not found or is not compatible: return to the first instruction in Part 3 – Locating the Industry in the Industrial Coding Manual (ICM) on page 28 and repeat all subsequent steps. If the problem cannot be resolved, complete a Referral Form for this question.
If responses in Questions 37, 38, 39 and 40 do not correspond to one of the listed categories, but it is still evident that they refer to other government services	Carefully study the description of industries in Division N, Government Service Industries to determine if there is an appropriate industry in this Division to which the description could be coded.	If successful: accept the industry code; proceed to Chapter IV, Coding of Occupation on page 41 for this person. If not successful: complete a Referral Form for this question.
If responses in Questions 37, 38, 39 and 40 do not correspond to one of the listed categories and after examination it does not appear that the responses refer to other government services	Treat this title as non-government.	Turn to Part 3 – Locating the Industry in the Industry Coding Manual (ICM), on page 28.

Federal Government

Government Department	Branch/Division/ Nature of Work	Possible Code Assignments
Indian and Northern Affairs Canada	Teaching	851 – Elementary and Secondary Education
Canada Post	All employees	484 – Postal Service Industry
Transport Canada	Persons engaged in services associated with harbour maintenance	455 – Service Industries Incidental to Water Transport
	Persons engaged in airport operations (e.g., air traffic controllers)	452 – Service Industries Incidental to Air Transport
	Dredging	412 – Other Heavy Construction
Any federal department	Persons employed in hospitals, schools, colleges, museums, libraries, etc., operated by the federal government	Do not assign a code in Division N, Government Service Industries. Assign a code from the ICM according to the specific industry.

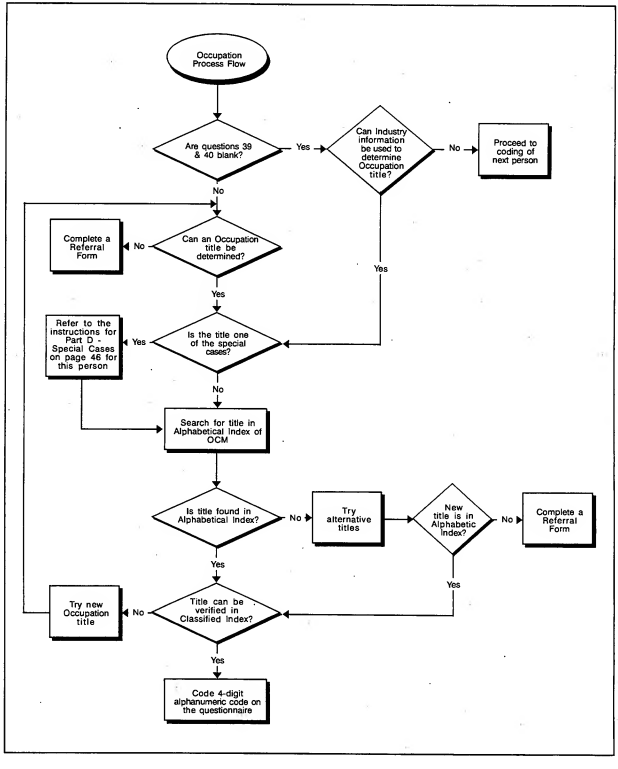
Provincial Government

Government Department	Branch/Division/ Nature of Work	Possible Code Assignments
Department of Health (or its equivalent)	Persons employed in hospitals or health centres	861 – Hospitals
Department of Natural Resources (or its equivalent)	Persons employed in forestry services, such as forestry patrollers	051 – Forestry Services Industry
	Persons employed in fishery services, such as fishery inspection and protection services	032 – Services Incidental to Fishing
Department of Transportation and Communication (or its equivalent)	Persons engaged in ferry operations	454 – Water Transport Industry
Department of Transport (or its equivalent)	Persons engaged in bridge or road construction	412 – Highways, Streets and Bridges
	Persons engaged in highway, road and bridge maintenance	459 – Highway, Street and Bridge Maintenance Industry
Any provincial department	Persons employed in schools, universities, colleges, museums, libraries, etc., operated by a provincial government department	Do not assign a Provincial Administration code. Assign a code from the ICM according to the specific industry.

Municipal/Local Government

Government Department	Branch/Division/ Nature of Work	Possible Code Assignments
Water Commission, Filtration Plant	All employees	493 – Water Systems Industry
Sanitation Department	Persons engaged in garbage disposal or sewage treatment	499 – Other Utility Industries, n.e.c.
Gas Distribution Company	All employees	492 – Gas Distribution Systems Industry
Health Units	All employees	863 – Non-institutional Health Services
Roads	Persons engaged in bridge/road maintenance	459 – Highway, Street and Bridge Maintenance
Hydro or Electric Power	All employees	491 – Electric Power Systems Industry
School Board	All employees	851 – Elementary and Secondary Education
Transportation Commission	All employees	457 – Urban Transit Systems Industry
Any municipal department	Persons employed in hospitals, schools, colleges, museums, libraries, etc., operated by the municipal government	Do not assign a Local Administration code. Assign a code from the ICM according to the specific industry.

Coding of Occupation Flow Chart



IV. Coding of Occupation

A. Introduction

There are two questions on the 1996 Census questionnaire related to Occupation: Question 39, Kind of Work and Question 40, Most Important Duties.

For every written response to either or both of these questions, it will be your task to convert the written description of the respondent's kind of work into an occupation title and to assign this title a 4-digit alphanumeric code using the Occupational Coding Manual (OCM).

This chapter presents the general procedures for coding Occupation responses. At the end of the chapter is a section of Special Cases which will provide specific instructions for coding particular Occupational responses. **It is essential that you become familiar with the OCM and the special cases in order to code Occupation correctly.**

B. The Occupation Coding Manual (OCM)

The OCM organizes occupations into broad occupational categories, major groups, minor groups and unit groups. It is divided into three sections: the Classification Structure, the Classified Index and the Alphabetical Index.

The Classification Structure lists the broad occupational categories, major groups, minor groups and unit groups.

The Classified Index contains written descriptions of the major groups, minor groups and unit groups. Following the unit group description may be a list of exclusions – similar occupations which **do not** form part of the unit group. All of the unit groups contain a list of main tasks that may be performed by persons in the unit group and a list of example job titles. It should be noted that the list of main tasks and example titles are not exhaustive, but are meant as a guide to aid in coding occupation responses.

Finally, the Alphabetical Index contains occupation titles and their corresponding codes sorted alphabetically. Again, this list is not exhaustive, but meant as a guide to aid in coding occupation responses.

C. General Procedures

1. Determining a Response to the Occupation Questions

Situation	Action
If **Questions 39 and 40** are blank, check the Industry questions (37 and 38) for occupation information.	If an occupation title can be determined from these questions, then accept this information as a valid occupation response. Continue with Part 2 – Determining the Occupation Title on page 43. If no occupation information is found in questions 37 to 40, continue with the next person on the questionnaire.
One occupation is reported.	Continue with Part 2 – Determining the Occupation Title on page 43.
If **two or more** occupations are reported by the respondent.	If there is industry information (questions 37 and/or 38) for only one occupation, then choose this occupation as the one to code. **Note:** It is always preferable when deciding which responses to code that the Occupation and Industry responses be consistent. If there is no industry information, try to determine if one occupation is more important than the other, e.g., the respondent has indicated he worked more hours for one occupation, or information is written beside one of the responses. Consider this as the respondent's primary occupation and continue with Part 2 – Determining the Occupation Title on page 43. If one occupation does not appear more important, then consider the first occupation reported as the primary occupation and continue with Part 2 – Determining the Occupation Title on page 43.

2. Determining the Occupation Title

Using information provided in questions 39 and 40 along with information in questions 37 and 38, determine an Occupation title by applying the following:

- When a description of an activity is provided, convert it to a noun form (e.g., "selling shoes to customers" becomes "shoe sales clerk" and "farming" becomes "farmer").

- In some cases, an Occupation title may not be readily apparent from the respondent's description (e.g., "mixing drinks for customers" becomes "bartender").

(a) If an Occupation title can be determined, continue with Part 3 – Determining Special Cases below.

(b) If an Occupation title cannot be determined (e.g., the response is too vague, or more than one occupation could apply), complete a Referral Form and continue with the next person on the questionnaire.

3. Determining Special Cases

It is necessary to determine if any one of the following special cases applies to the respondent.

- Assistant
- Apprentice or Trainee
- Helper
- Labourer
- Owner/Proprietor of own business
- Contractor
- Supervisor/Foreman/Forewoman
- Manager
- Member of the Armed Forces
- Member of a Religious Order
- Sales Representative/Sales Specialist/Salesperson, Wholesale Trade

(a) If one of the above special cases applies, turn to Part D — Special Cases on page 46 for additional instruction on coding these occupational responses.

(b) If the respondent **is not** one of the special cases, continue with Part 4 – Locating the Occupation Title in the OCM on page 44.

4. Locating the Occupation Title in the OCM

Search for the occupation title in the Alphabetical Index of the OCM (see Diagram 4.1 on page 45).

(a) If an occupation title is found in the Alphabetical Index of the OCM, continue with Part 5 – Verifying the Unit Group below.

(b) If an occupation title cannot be found in the Alphabetical Index of the OCM, search the Alphabetical Index again after trying one or more of the following:

- ensure the spelling is correct
- search for synonyms of the occupation title
- try alternate titles

(c) If after trying the above steps an occupation title is found, continue with Part 5 – Verifying the Unit Group below.

(d) If after trying the above steps an occupation title still cannot be found, complete a Referral Form and continue with the next person.

Note: When an occupation title cannot be found in the Alphabetical Index, another method that may be used to search for an occupation code is to browse the Classification Structure at the front of the OCM for unit groups which may contain occupation titles similar to the title being searched.

5. Verifying the Unit Group

Go to the Classified Index of the OCM for the unit group description of the selected code. Ensure that the correct unit group has been selected by checking that the respondent's:

- occupation description agrees with the unit group description
- most important duties (if provided) are compatible with one or more of the main tasks listed for the occupation unit group
- occupation title is not listed in the exclusions
- occupation title is compatible with the list of example titles for the unit group

(a) If you determine that the correct unit group has been found, continue with Part 6 — Entering the Occupation Code on the Questionnaire on page 45.

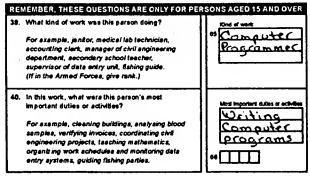
(b) If you determine that the correct unit group has not been found, repeat the coding procedures (Parts 2 through 5) one more time. If an appropriate unit group still cannot be found, complete a Referral Form and continue with the next person.

6. Entering the Occupation Code on the Questionnaire

After verifying that the correct unit group code has been selected, write the code in the space provided in the lower left corner of question 40 (see Diagram 4.1 below).

Use a capital letter for the first character (e.g., A, B, C). Take the time to write the code clearly and neatly. Ensure that G's don't look like 6's, B's don't look like 8's, etc.

Diagram 4.1
Searching the Alphabetical Index



OCM - Alphabetic Index

OCMI Ligne 1097 à 1113

```
C063    Computer programmer
F011    Computer search librarian
C142    Computer service technician
C047    Computer software engineer
A122    Computer system operations manager
C062    Computer systems consultant
A122    Computer systems development manager
C047    Computer systems engineer
G121    Computer systems, customer services representative
B521    Computer tape librarian
B411    Computer tape library supervisor
E121    Computer training specialist, except educational instruction
B523    Computer typesetter
C153    Computer-aided design and drafting technologist
C153    Computer-aided drafting technicians
B531    Computerized accounting clerk
J162    Computerized cutter, fabric
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Help   F3=Manuals List   F4=Search Screen   F7=Prev Page   F8=Next Page
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D. Special Cases

Special Case	Rule
Assistant	Many assistant occupations are listed as titles. Check the alphabetical index to find a title match. If no title match is found, assistants in health and science occupations are usually coded to technologist and technician unit groups according to the kind of work performed, e.g., an assistant mechanical engineer is coded to C132 – Mechanical Engineering Technologists and Technicians. If an appropriate technician group does not exist and a suitable title match cannot be found in the alphabetical index, code the assistant to the same unit group as the people they assist, e.g., an assistant restaurant manager is coded to A221 – Restaurant and Food Service Managers.
Apprentice or Trainee	Apprentices and trainees are coded to the occupation for which they are being trained, e.g., an apprentice carpenter is coded to H121 – Carpenters.
Helper	If a specific title cannot be found in the alphabetical index, helpers are coded to the elemental worker or labourer unit groups according to the kind of work they are doing, e.g., a truck driver's helper is coded to H832 – Railway and Motor Transport Labourers.
Labourer	Many respondents report their kind of work as labourer followed by a more specific job description. These responses should not be coded to the unit groups for labourers if the information clearly indicates another occupation code is applicable, e.g., a labourer who reports driving a truck as his most important duty should be coded to H711 – Truck Drivers.

Special Cases (Continued)

Special Case	Rule
Owner/Proprietor of a Business	Owner/proprietors of businesses in retail trade, restaurant or food services, accommodation services, general construction or residential home building are coded to the following management occupations: A211 – Retail Trade Managers A221 – Restaurant and Food Service Managers A222 – Accommodation Service Managers A371 – Construction Managers A372 – Residential Home Builders and Renovators Owner/proprietors of businesses not listed above are coded according to their kind of work and most important duties.
Contractor	Contractors in construction, residential home building, agriculture or landscaping are coded to the following unit groups: A371 – Construction Managers A372 – Residential Home Builders and Renovators I012 – Agricultural and Related Service Contractors and Managers I015 – Landscaping and Grounds Maintenance Contractors and Managers Contractors in a specific trade or business not listed above, are coded to the supervisor group of that trade, e.g., a plumbing contractor is coded to H013 – Contractors and Supervisors, Pipefitting Trades.

Special Cases (Continued)

Special Case	Rule
Supervisor/Foreman/ Forewoman	Supervisors are coded in a unit group separate from the workers they supervise in the following minor groups: B41 – Clerical Supervisors D11 – Nurse Supervisors and Registered Nurses G01 – Sales and Service Supervisors H01 – Contractors and Supervisors, Trades and Related Workers H02 – Supervisors, Railway and Motor Transportation Occupations I01 – Contractors, Operators and Supervisors in Agriculture, Horticulture and Aquaculture I11 – Supervisors, Logging and Forestry I12 – Supervisors, Mining, Oil and Gas J01 – Supervisors, Processing Occupations J02 – Supervisors, Assembly and Fabrication To be coded as a supervisor, respondents must report supervisor or foreman/forewoman as their kind of work OR list supervising as one of their most important duties OR be a contractor (see special rules above). **Note:** The title "lead hand" is not considered a supervisory position unless other information is present which supports a supervisory role, e.g., lead hand, supervising crew.

Special Cases (Continued)

Special Case	Rule
Supervisor/Foreman/ Forewoman (Con't)	In cases where an occupation has no corresponding supervisor group (most often a professional or technical occupation), respondents are coded with the workers they supervise, e.g., a geologist who reports supervising a survey crew as his most important duty is coded to C013 – Geologists, Geochemists and Geophysicists. **Note:** Supervisors should not be coded to a management occupation, that is, any code beginning with the letter A.
Manager	To be coded as a legislator or senior manager (codes A011, A012 or A013), respondents **must** report a legislator or senior manager job title, e.g., senator, chief statistician, chief executive officer, etc. To be coded as a manager, respondents must report a manager title as their kind of work OR describe management duties as their most important duty OR they must be an owner/proprietor in one of the following businesses: A211 – Retail Trade Managers A221 – Restaurant and Food Service Managers A222 – Accommodation Service Managers A371 – Construction Managers A372 – Residential Home Builders and Renovators Certain occupation titles contain the word manager, but clearly should not be coded to the management category: Office manager is coded to B311 Produce manager is coded to G011 Meat manager is coded to G011 Grain elevator manager is coded to G134 Property manager is coded to B314 Forest management is coded to C022

Special Cases (Continued)

Special Case	Rule
Manager (Con't)	Respondents who report "project management" or "case management" are also not considered to be managers, e.g., a social worker, involved in case management is coded to E022 – Social Workers. "Managing staff" is not usually a management duty. If no other management duties (e.g., planning, directing, controlling a department or business) are reported by the respondent, then the respondent should be coded as a supervisor. The following managers in agriculture, aquaculture and landscaping are not coded in category A: I011 – Farmers and Farm Managers I012 – Agricultural and Related Service Contractors and Managers I014 – Nursery and Greenhouse Operators and Managers I015 – Landscaping and Grounds Maintenance Contractors and Managers I017 – Aquaculture Operators
Member of the Armed Forces	Members of the Armed Forces are coded according to rank, e.g., a private in the Armed Forces is coded to G624 – Other Ranks, Armed Forces. If a military rank is reported by the respondent but it cannot be found in the OCM, then complete a Referral Form and continue with the next person.

Special Cases (Concluded)

Special Case	Rule
Member of a Religious Order	Members of religious orders who report lay work (non-religious work) for example, teaching, nursing, or social work, are coded according to the non-religious work performed, e.g., a nun who reports teaching grade 4 in an elementary school is coded to E132 – Elementary School and Kindergarten Teachers. If it cannot be determined whether the work performed by a member of a religious order is lay work or purely religious, then code to the appropriate group for religious occupations: E024 – Ministers of Religion or E216 – Other Religious Occupations.
Sales Representative/ Sales Specialist/ Salesperson, Wholesale Trade	Salespersons in wholesale trade sell goods and services to businesses and retail outlets. Salespersons who sell goods or services requiring knowledge of science or engineering, e.g., a computer systems salesperson, a pharmaceutical sales representative or a heating equipment sales representative, are coded to G121 – Technical Sales Specialists, Wholesale Trade. Salespersons who sell goods and services which do not require specialized knowledge of science or engineering, e.g., an advertising salesperson, a wholesale food products representative, or a freight sales agent, are coded to G111 – Sales Representatives Wholesale Trade (Non-Technical).

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